

# THE REGIONAL APPROACH TO THE PHENOMENON OF POPULATION AGING AND SUSTAINABLE TOURISM

*"Knowing how to grow old is a masterpiece of wisdom,  
and one of the most difficult chapters in the great art of living".*

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(1821-1881)

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**Abstract:** This paper highlights the regional phenomenon of population aging and its effects on sustainable tourism, especially the potential benefits both for the elderly and for the tourism business area. While dealing with the regional phenomenon of population aging, activities specific to this age category may be performed in an engaging manner so as to involve the elderly in some economic activities, such as those related to tourism. The way of using these human resources in some economic activities represents a capitalization of the potential of the existing human resources, of the experience acquired over time; they can contribute to the development of businesses, but also to supplementing the income of the elderly individuals. The specific activities in the field of tourism may be carried out either by ensuring a management provided mainly by the elderly who can still be active in this field, or by organizing tourist events whose beneficiaries are the elderly as tourists. Both levels of activity in the field of tourism have as a major role in involving the elderly in activities specific to the age category, and strengthening the development of sustainable tourism. Tourist activities may attract the elderly at a national level, but also at international level and may contribute to the development of businesses in the field of tourism; it may be approached by development regions through packages specific to the area and also to the tourists' age category. History, religion, biodiversity, culinary art specific to some areas, but also other themes, may be addressed within the tourist packages. The performance of such activities brings benefits on several levels, such as quality of life, whereas entrepreneurs in the field of tourism and transport, respectively hotels and restaurants, and also in the area of transport (by airplane, car, or ship) gain incomes.

**Keywords:** demography, population aging, sustainable growth.

## INTRODUCTION

The regional phenomenon of population aging affects the economies of an increasing number of states, and its effects are among the most diverse from economic, social and demographic points of view. Tourism is also affected, as well as sustainable development; they may be relaunched if specific economic and legislative measures are taken to support the elderly, so as to encourage activities connected to the tourism business. The involvement of the elderly in various activities contributes to increasing social inclusion, and improving the quality of life for this category of citizens. For this, one must be aware of the matter but also identify possible solutions by designing policies at the national level as well as at the European level. Promoting sustainable activities for the elderly requires awareness of the social inclusion and exclusion of the elderly.

The two terms - inclusion and exclusion - may be understood starting from the latter, which has been used for longer. Thus, social exclusion occurs in many states, but especially in the European ones. Social exclusion ultimately represents a failure of the state in terms of ensuring the well-being of citizens, respectively in integrating the elderly into appropriate social activities.

It is important to be aware of and implement the best practices recognized in some European countries that have faced population aging and have also undertaken efforts to promote social inclusion.

All the areas, domains and fields in which the elderly may be kept active as employees must also be identified; among them are the following: sustainable tourism in locations recognized as attractive, such as

historical areas, areas with strong religious influences, tourist areas recognized as special attractions, with special reference to the Danube Delta - part of the UNESCO World Heritage, and so on.

### SOCIAL INCLUSION AND EXCLUSION

Social inclusion is the process by which people facing the risk of poverty and of social exclusion as well may have access to opportunities and resources in order to fully take part in the economic, social and cultural life and to benefit from the advantages of a decent standard of living and a level of well-being that is considered normal in the economy they live in.

Social inclusion encourages participation in the decision-making process, providing the opportunity to benefit from the fundamental rights to the people who own them, as mentioned in some studies of international financial bodies.<sup>1</sup> However, there are also some experts' opinions<sup>2</sup> according to which social inclusion is the mechanism by which people are given opportunities to participate in all areas of social life. We believe that people, especially the elderly, may be attracted to increasingly diverse activities, such as sustainable tourism activities, addressed by development regions by specific packages depending on the area but also on the tourists' age category.

As for social exclusion, it has been correlated with the inability of the state to ensure an increase in the citizens' well-being as shown by some authors.<sup>3</sup> Likewise, social research has revealed the fact that the term *social exclusion* is complex and describes a broader, multidimensional concept that has even been included in social discourse.<sup>4</sup> Other social research<sup>5</sup> stated that the term *social exclusion* has a special complexity and is also related to the concept of poverty. Since the late 1980s and early 1990s, researchers and policymakers have increasingly recognized the multidimensional nature of poverty.

The aforementioned broader concept, namely social exclusion, with origin in the French social discourse, was introduced in the political discourse of the 1980s. Therefore, while poverty refers to the lack of material resources, especially income, social exclusion is more comprehensive and refers to "*the dynamic process of being shut out ... from any of the social, economic, political and cultural systems which determine the social integration of a person in society*".<sup>6</sup>

Multidimensionality is in reality a key and most important element, namely the advantage of the concept of social exclusion over poverty. Moreover, at the same time, some authors introduce a dynamic perspective<sup>7</sup> towards understanding the processes that lead to the lack of achievement of civil, political and social citizenship rights.<sup>8</sup>

The elderly population is particularly vulnerable to changes in their income. For example, research shows that there is a correlation that stretches over time between old age and poverty in the UK. Thus, some authors believe that citizens at retirement age are more vulnerable to being affected by poverty than paid workers.<sup>9</sup>

Other authors believe that widows are at the greatest risk.<sup>10</sup> Goldfield also shows in a specialized analysis of the structure of the British population published in "*Wealth of the Nation 2005*" that both poverty and wealth correlate with a certain population structure. At the same time, the same author shows that while rich areas are characterized by many older middle-aged people, the families of those living in poor neighbourhoods have a high number of children and elderly.<sup>11</sup>

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<sup>1</sup> World Bank, 2007 (*Social Exclusion and the EU's Social Inclusion Agenda Paper Prepared for the EU8 Social Inclusion Study*, [online] Available at: <http://siteresources.worldbank.org/INTECONEVAL/Resources/SocialExclusionReviewDraft.pdf> (accessed September 2018).

<sup>2</sup> Silver 2015.

<sup>3</sup> Börsch-Supan et al. 2015, 1-22.

<sup>4</sup> Atkinson 1998.

<sup>5</sup> Hoff 2008.

<sup>6</sup> Walker, Walker 1997.

<sup>7</sup> Room 1995.

<sup>8</sup> Tsakoglou, Papadopoulos 2002.

<sup>9</sup> Ogg 2005, 69-90.

<sup>10</sup> Gordon et al. 2000.

<sup>11</sup> Goldfield 2005.

Although the Department for Work and Pensions considers that there has been a remarkable reduction in pensioner poverty over the past decade (Department of Work and Pensions - DWP 2005), almost a quarter of all British pensioners continue to live in poverty at the beginning of the 21<sup>st</sup> century. It is therefore estimated that a significant ratio of elder British is excluded from full participation in social life.

Among the essential properties of the concept of social exclusion may be mentioned: the *multidimensional and dynamic specificity* (with consequences not only in the present, but also in the future), it *depends on certain conditions* (it occurs in a certain period or at a certain moment, in a certain area or society), *institutional specificity* (it occurs outside the individual's responsibility), *connecting feature* (which means that disconnection is done at the community level).

There is research<sup>12</sup> on social inclusion and exclusion according to which the factors that may affect the state of well-being, the economic situation, poverty and social exclusion are *financial capital* (respectively the individual's ability to obtain financial resources from work), *physical capital* (if the individual owns land or a house, including the community he lives in together with the necessary infrastructure allowing that individual's access to education and social activities), *human capital* (a person acquires this capital as a result of education and training) and *social capital* (social networks). The multidimensional nature of social exclusion appears to be very important especially for the elderly, particularly since papers,<sup>13</sup> research<sup>14</sup> and analysis<sup>15</sup> on social exclusion and population aging reveal the importance of the impact of exclusion on different areas of life.<sup>16</sup>

We must mention that there are no miraculous solutions or any "best policy" that are successful (or work) in all 27 Member States of the European Union.

Most social policies and programs aimed at social inclusion must take into account the cultural contexts, the historical and political richness specific to each state.

It should be noted that what works and has good results in one country does not necessarily work and have the same results in another state. The cultural and political factors specific to the states may only be understood and presented after an analysis of the history of that country.

We must also mention that some countries share similar institutional structures. Some researchers, experts and professionals in European social policy analysis have used these particularities by grouping states into welfare state typologies taking into account their institutional similarities.

They took into account both the institutional framework that includes the market, the family and the state in the macroeconomic sense of society, as well as the individual correlations between the state and the family but also the market at the microeconomic level.<sup>17</sup>

The link between these three important institutions has been schematized as a genuine "*triangle of well-being*",<sup>18</sup> while others have been extended as a way of recognizing the important effort of the voluntary sector to increase well-being and which translates into a "*diamond of well-being*".<sup>19</sup> Thus Figure 1 below shows the existing division of labour between the welfare-producing societal sectors, assembled in a "*diamond of well-being*".

Several studies, analyses and research aiming at classifying the concrete regimes of the welfare state had their basis in the groundbreaking work published by Esping-Andersen.<sup>20</sup> Thus, Esping-Andersen in the work "The Three Worlds of Welfare Capitalism" projected three regimes of the welfare state: *liberal*, *conservative-corporatist* and *social-democratic*. Countries were classified in these components of the welfare state considering the experience-based measures of social rights but also taking into account both the degree of their dependency and the incomes obtained.

<sup>12</sup> World Bank 2007.

<sup>13</sup> Grenier, Guberman 2009, 116-124.

<sup>14</sup> Walsh, O'Shea, Scharf 2012.

<sup>15</sup> Hrast, Mrak, Rakar 2013, 971-989.

<sup>16</sup> Grenier, Guberman, 2009; Walsh et al. 2012; Hrast et al. 2013.

<sup>17</sup> O'Connor, Orloff, Shaver 1999.

<sup>18</sup> Ganßmann 2000.

<sup>19</sup> Pijl 1994, 3-18.

<sup>20</sup> Esping-Andersen 1990.

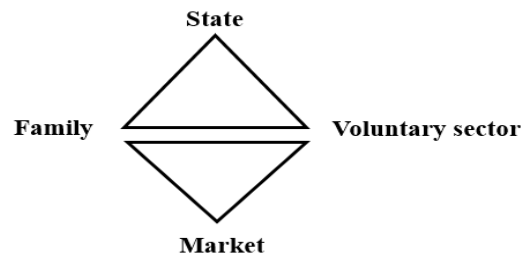


Fig. 1 Assembly of 4 components into a "well-being master"  
(Source: Pijl 1994; Hoff 2008 and own interpretations by the author).

As Esping-Andersen points out, welfare states have all the essential conditions to counteract individual labour dependence on the market by entrusting a means to ensure existence that is not dependent on earned income, but on social rights and citizenship instead. In addition, he emphasized the duties of the welfare state as a way of political, economic, social stratification that can reduce or strengthen the intensity of a phenomenon such as social inequality. A few years later, arguments were found to add two more specific welfare state regimes: the Southern European model<sup>21</sup> and the Eastern European model.<sup>22</sup>

Ultimately the process of measuring social exclusion/inclusion should start from the legitimate question *how poverty and social exclusion should be measured*, which may be a question that mainly concerns the academic environment or only a few experts, researchers and academicians who are quite passionate, but of no importance to the real world.

Solving this measurement problem has been mainly a political one and has been very much the focus of attention at the World Trade Organization.

Since the creation of the European Union, the social aspects of the inclusion process have been a concern, so that Member States have agreed that a series of "structural indicators" are needed to evaluate the progress made regarding the Lisbon strategy. Thus, the evolution of these indicators was included in the annual summary reports drafted by the European Commission.

At first, the list of structural indicators was finalized jointly by the European Commission, the Ecofin Council and the Economic Policy Committee and was approved at the Nice Summit in 2000.

The list initially provided for 35 indicators, of which only 7 included elements of social cohesion. Specifically, the 7 considered: (1) income distribution, (2) poverty rate before/after social transfers, (3) persistence of poverty, (4) regional cohesion, (5) early school dropout not in education or continuing training, (6) long-term unemployment rate and (7) the population of unemployed households. Later the list was modified, so that an extended list of 18 detailed social indicators was developed as primary indicators and secondary indicators.<sup>23</sup>

The 18 indicators covered four dimensions of social exclusion – financial poverty, employment, health (including life expectancy at birth) and education – and were taken into account by Member States when drawing up their own action plans. Therefore, since 2003 all Member States are obligated to use these indicators established by common agreement.

We believe that the process of social inclusion at the level of the European Union, as shown by social policies but also by a series of good practices, may be considered important; it may represent a good model and it may contribute to a better social inclusion of the elderly.

If these policies, which can be expressed quantitatively, are combined with qualitative elements, as well as with national but also regional or local elements, very good results may be obtained.

<sup>21</sup> Ferrera 1996, 17-36.

<sup>22</sup> Deacon et al. 1992.

<sup>23</sup> 11 Dispersion around the 60% median low-income threshold; 12 Low-income rate anchored at point in time; 13 Low-income rate before transfers; 14 Distribution of income (Gini coefficient); 15 Persistence of low income (based on 50% of median income); 16 Long-term unemployment rate; 17 Very long-term unemployment rate; 18 Persons with low educational attainment.

Social actors, other than the state, namely the voluntary sector, may be called upon by using an open method of agreement for all parties, which may contribute to the design and elaboration of social policies.

Such an approach may lead to a new integrative view regarding the development of social policies and governance with the confidence to better encompass the concern to achieve the satisfaction of some needs of those affected. At the same time, the role of NGOs appears as important in this process, as emphasizing the elders' concerns and needs to decision-makers and distributing responsibility in terms of providing a specific objective may be more efficient and cost-effective.

### **ELEMENTS THAT MAY CONTRIBUTE TO THE OCCUPATION AND MAINTAINING THE ELDERLY ACTIVE**

A very important element that may contribute to the employment and keeping the elderly active is to use the best practices recognized in some European countries that have faced the phenomenon of population aging and that have also undertaken efforts to promote social inclusion such as: Hungary, Poland, Italy, Portugal, Bulgaria, Great Britain and the Czech Republic.

The purpose is to use others' experiences in order to promote social inclusion, especially of elderly people, to maintain their increased independence, including promoting their best possible image in society. A number of principles were taken into account in the process of selecting best practices, namely the organizations that have appropriated the recommendations, initiatives and innovative services, these being public but also private institutions or organizations, or actions undertaken within partnerships between the public and private system. Among the types of recommendations implemented, the ones that focused on the possibility of the elderly to re-enter the labour market, activities and initiatives to increase social participation in various sustainable tourism, cultural, recreational, sports actions, but also to continue the lifelong learning process, to reduce isolation and to promote integration links, were kept in mind. The effects on the elderly population and the level at which the initiative was implemented (national, regional, urban, rural) were also taken into account.

Among the best practices grouped by important areas for social inclusion, the following could be identified: *the recommendation to organize and support elderly workers to continue their activity in areas that bring them increasing benefits* (in the Czech Republic<sup>24</sup>), *participation in some sustainable tourism, cultural, recreational, sports activities, but also cooperation in some volunteer activities* (mainly in Poland<sup>25</sup> the Czech Republic,<sup>26</sup> Hungary,<sup>27</sup> Great Britain<sup>28</sup>), *communication and integration relations of all people in the same age category* (in Portugal,<sup>29</sup> Italy,<sup>30</sup> Bulgaria<sup>31</sup>), *social inclusion allowing access to some social and medical services* (in the Czech Republic,<sup>32</sup> Bulgaria<sup>33</sup>), *reducing isolation and increasing social inclusion by means of the benefits of new technologies* (in Hungary)<sup>34</sup>, *facilitating the*

<sup>24</sup> <http://www.go50go.cz/projekty.htm>.

<sup>25</sup> The Voluntary Service Centre 2018 (<http://gcop.gliwice.pl>).

<sup>26</sup> Centrum Aktivio Starnuti (<http://www.veselysenior.cz/>, <http://aktivnistarnuti.org/projekty/vesely-senior-2/>).

<sup>27</sup> Urbanact 2018. (Cooperation between generations for urban social renewal. <http://urbact.eu/cooperation-between-generations-urban-social-renewal>).

<sup>28</sup> European Social Network 2018 ([www.esn-eu.org](http://www.esn-eu.org)).

<sup>29</sup> UNECE 2017, Third review and appraisal of the regional implementation strategy (RIS) of the Madrid International Plan of Action on Ageing (MIPAA), [https://www.unece.org/fileadmin/DAM/pau/age/country\\_rpts/2017/POR\\_report\\_EN.pdf](https://www.unece.org/fileadmin/DAM/pau/age/country_rpts/2017/POR_report_EN.pdf).

<sup>30</sup> [www.centroinfazia.it](http://www.centroinfazia.it), HELPS: Housing and Home Care for the Elderly and Vulnerable People and Local Partnership Strategies in Central European Cities. WP3: Catalogue of Practices.

<sup>31</sup> Ideas Factory 2018 (<http://ideasfactorybg.org/baba-residence/?lang=en>).

<sup>32</sup> ŽIVOT 90 2018, (<http://eng.zivot90.cz/4-social-services/10-areion-emergency-care> Eurocarers, 2018. AREION EMERGENCY CARE. <http://eurocarers.org/carict/servicedetail.php?id=53&qstring=a2V5d29yZD0=>).

<sup>33</sup> Bulgarian Red Cross 2018 ([http://en.redcross.bg/projects/finished\\_projects/home\\_care\\_project](http://en.redcross.bg/projects/finished_projects/home_care_project), Consultarea opiniilor unor experți precum Consulting the opinions of experts such as Siana Metodieva of the Bulgarian Red Cross).

<sup>34</sup> Eurocarers 2018 (SkypeCare. <http://eurocarers.org/carict/servicedetail.php?id=36&qstring=dGFzaz1wcm9qZWNoZrZlXl3b3JkPjXNreXB>).

*possibility of accessing superior living conditions for the elderly* (in Italy)<sup>35</sup>; *access to lifelong learning for the elderly* (in the Czech Republic).<sup>36</sup>

Among the measures that, in the author's opinion, may contribute to a better social inclusion of the elderly, several directions of action may be identified, such as:

- in the field of *social protection*, the pension system should be modified so that the demographic changes faced by the economy are taken into account;
- in the field of *occupational health and safety*, some measures should be taken aiming at reducing occupational risks and increasing workers' protection, altogether with reducing the risk factors that may generate workplace accidents;
- in the field of *employment*, elderly workers should be deemed vulnerable and some special measures should be detailed;
- in the *budgetary and fiscal* field, measures should be provided to attract older workers in both areas, namely the public environment - the possibility of offering the experience gained by providing professional training to the young who are starting out in activity, but also the private environment - providing support services for areas such as sustainable tourism in historical areas, in areas with strong theological and religious tradition, in tourist areas recognized as special attractions (mountains, sea, Danube Delta - part of the UNESCO World Heritage, salt mines, waterfalls, famous fortresses and castles, etc.);
- in the field of the developing one's skills but also of the ability of elderly workers to continue work may be facilitated based on the *lifelong learning process*.

Sustainable tourism may largely contribute to increasing the social inclusion of the elder and keeping them active. As mentioned before, the possibility of sharing the experience gained by providing professional training services to the young starting their careers, but also the private environment - providing support services for areas such as sustainable tourism in the most popular areas that highlight the national touristic, historical and cultural heritage in Romania.

Tourist attractions that promote sustainable tourism may be mentioned as being recognized in Romania, but also internationally, such as: Transalpina - an area in Gorj County that attracts many tourists, Transfăgărașan, a very picturesque and impressive objective, Bigăr Waterfall - one of the most beautiful waterfalls, which, in spite of some natural processes that have affected it, continues to be unique in the world as mentioned by The World Geography (which ranked the Romanian waterfall in first place in the top of the most impressive waterfalls in the world), Alba Iulia Citadel - which represents one of the largest fortresses in Romania, the Danube Delta - which is included in the UNESCO World Heritage Site, The Merry Cemetery in Săpânța - the cemetery with brightly painted crosses and with naive paintings depicting reveal scenes from the life, activity and occupation of the dead and on which some of the funniest messages may be found, Turda Salt Mine - it is a true history museum of salt mining in Romania, Vaserului Valley - where Mocănița, the forestry narrow gauge steam train may be mentioned as one of the most valuable natural landmarks in the Vișeu de Sus area and which stands out because it represents a main attraction for tourists since the 20<sup>th</sup> century, Viscri - one of the special villages in Romania, a relevant settlement for the Transylvanian plateau, which it is found near Sighișoara, originally inhabited by the Szeklers, and afterwards colonized by the Saxons in the 13th century, and where one can see nowadays a fortified evangelical church in the style of the fortified Saxon churches from Transylvania, the Curtea de Argeș Monastery - which, according to some authors and researchers, is a representative architectural wonder of Romania.

We would like to point out the specificity of the Danube Delta area as part of the UNESCO World Heritage. The Danube Delta area is an oasis of peace and relaxation in Romania. The Danube Delta<sup>37</sup> is

<sup>35</sup> Presto a casa 2018 (<http://sociale.comune.trieste.it/presto-a-casa/>).

<sup>36</sup> Brno City Police ([http://www.mpb.cz/en/public/senior\\_academy/](http://www.mpb.cz/en/public/senior_academy/)). European Crime Prevention Award. 2018. EUCPN Toolbox series no. 10, [https://eucpn.org/sites/default/files/content/download/files/eucpn\\_toolbox\\_ndeg10\\_page\\_par\\_page.pdf](https://eucpn.org/sites/default/files/content/download/files/eucpn_toolbox_ndeg10_page_par_page.pdf)).

the natural reserve protected and surrounded by vegetation, with many species of rare animals and birds. The Danube Delta is considered one of the most beautiful in the world, and it is one of the largest wetlands in Europe, formed over more than 10.000 years. Specialists claim that the Danube Delta has one of the lowest population densities in Romania. It is also said that in the Danube Delta the density is one inhabitant to approximately 30 hectares. According to some experts and researchers, the Danube Delta is one of the most compact reed areas in the world. It is also mentioned that in the Danube Delta, fish such as the beluga were caught, one of which weighed about 882 kg, and another of 675 kg,<sup>38</sup> caught in 1890 by the fisherman Dimache Gheorghe in Sfântul Gheorghe town. It should also be noted that Sulina is the only city in the Danube Delta that has both a port on the Danube and the Black Sea. Sulina is also a city located at the lowest altitude in Romania.

### CONCLUSIONS AND PROPOSALS

To sum up, some identified causes that contribute to the decision of elderly workers to continue being active are: the mind set to work, to which is added the possibility of obtaining an income from work that ensures a higher social and financial comfort. One may consider that the elderly worker's decision to be active is also correlated with the health status, but also with the mental state and physical well-being. Supporting the older worker to take up a job after retirement, as well as training programs adapted to them, are factors that could lead to encouraging results and increasing the employment of older workers. Also, among the conditions that limit the elderly people's work period, we identify the *intrinsic* ones respectively: the level of education, the way of adapting to the changes in society but also the occupation if it corresponds to the current employers' requirements including the evolution of the labour market and *extrinsic* ones, respectively: residence (urban, rural), economic activity area, the features of each organization (values, compensation system, working conditions).

Therefore, we recommend some measures and actions to encourage employment among elderly workers, respectively supporting elderly workers to be active for a longer period in the labour market:

- flexible working arrangements which should have positive effects and may be of increased interest to a large number of older workers as they approach retirement;
- encouraging performing work at home, which allows elderly employees to decide on the work schedule;
- the use of telework, which can lead to increased employment among older workers, especially for that category that currently uses information technology;
- placement in positions with tasks and attributions adapted to responsibilities and physical health, a measure that can be applied especially in the case of elderly people;
- the use of elderly people in sustainable tourism activities in the most popular areas that emphasize the national touristic, historical and cultural heritage in Romania as recognized both in Romania, but also internationally, especially in the area of the Danube Delta as part of the UNESCO World Heritage, but also in other areas of Romania in general.

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<sup>37</sup> The Danube Delta, the second largest in Europe, after the Volga Delta, has 82% of its surface on Romanian territory. It has Biosphere Reserve status. With a spectacular mix of wetland and aquatic habitats, the Danube Delta is known as the "Grigore Antipa" National Museum of Natural History "bird paradise", <https://antipa.ro/product/delta-dunarii/>.

<sup>38</sup> "Grigore Antipa" National Museum of Natural History.

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